

# Employee

- Introduction
  - Introduction
- Tab
  - Employee
  - Contact (User)
  - Location
  - Bank Account
  - Personal Information
  - Education
  - Experience
  - Training
- Validation
  - Validations
- Video

# Introduction

# Introduction

1. Employee Master window is used to maintain the employee details.
2. The Employee master is used to maintain the all data about the employees , It includes User details, Location Details, Personal Details, Bank Account Details.

Tab

Tab

# Employee

## Critical Fields :

1. Search Key : Used to maintain the employee code and unique id number.(Use characters and numbers)
2. Group : We can mention the Employee Group(Group is an another master window) (Do not change the Group after the transactions)
3. Name : We can create Employee Name.(Ex : Ranjith Pvt.Ltd )

## Critical & onetime setup fields :

## Non-Critical Fields :

1. Operator Check Box : When we select this check box this Employee Name will shown in Production queue.

2. Sales Representative : We can use the Employee as a Sales Representative when select this check box.
3. Payment Term : We can select payment term from the payment term master.
4. Payment Rule : This is used to select the payment type.(Ex : Cash, Check , On Credit)
5. Price List : We can select the Price list type from the price list master.(Ex : Purchase, Sales)
6. Delivery Rule : We can select the delivery rule from the list.(After Receipt , Availability, Manual)
7. Delivery Via : We can select the Delivery Type from the list .(Pick Up, Shipper, Delivery)

## **Zoom condition's :**

1. We can find the transactions by using this Employee.(EX : Purchase Order,Material Receipt,Salas Order,Salary Structure, Leave Status, Loans and Advances, etc..)

## **Customization :**

Tab

# Contact (User)

The screenshot shows the 'Contact (User)' form in the KCONNECT ANALYTICS application. The form is for 'Employee: 1000003 Name 1'. The 'Data requested' section includes fields for Client (Kconnect Demo), Employee Name (Ranjith Pvt. Ltd), Name (Name 1), Description, and Comments. Below this is a section for 'Active' (checked) and 'Email Address' (name@gamil.com). The 'Greeting' field is a dropdown. The 'Title' field is empty. The 'Phone' field contains 9875436746. The 'Fax' field is empty. The 'Position' field is a dropdown. The 'Email Verify' field is empty. The 'Password' field is masked with dots. The 'Partner Location' field is a dropdown set to Coimbatore. The 'Birthday' field contains 06/04/2019. The '2nd Phone' field is empty. The 'Notification Type' field is a dropdown set to Email+Notice. The 'Full BP Access' checkbox is checked. The 'Verification Info' field is empty. A dropdown menu is open, showing a list of document types: Invoice (Customer) (#8), Invoice Payment Schedule (#2), Material Receipt (#10), My Sales Order (#6), Project (#1), Project (Lines/Issues) (#1), Purchase Order (#6), Quotation (#1), Sales Order (#5), and Shipment (Customer) (#2).

## Critical Fields

1. Name : We should maintain the contact user name for that employee. (Ex : Name )
2. Birthday : It is used to maintain the Birthday Date.(Ex : 06/04/2019)

## Critical & onetime setup fields

## Non-Critical Fields

1. Email Address : It is used to maintain the Email Id for this user.(Ex : Name1@gmail.com)
2. Email User Password : This is used to maintain the Password for the mail ID.
3. Partner Location : Used to maintain the Partner location. (To create location refer location Master)
4. Supervisor : This field is used to maintain the supervisor of the particular Employee.(This name is also created in Employee window)

5. Phone : Used to maintain the user contact Number.

## **Zoom condition's**

1. We can check the transactions by using this contact user.(Ex : Purchase Order,Sales Order,Material Receipt,Invoices,..)

## **Validation**

1. Save : Used to Save the Record.
2. Delete : Used To Delete the Saved Records.



Tab

# Location

KCONNECT ANALYTICS

Prasanth P@Kconnect Demo./Kconnect Demo Admin

Feedback | Profile | Preference | Change Role | Log Out

Home (7) | Summary | Employee: 1000003 Name 1

Favourites | Recent Items

Employee > Location

Record saved

Client: Kconnect Demo | Organization: Manufacturing Discrete

Employee Name: Name 1

Name

Country: India | State: TamilNadu | City: Coimbatore

Address 1: Door no 22 | Address 2: xyz street | Address 3: Near vgs garden | Address 4: Coimbatore

Postal Code: 645124515 | Latitude: | Longitude: |

Phone: | 2nd Phone: 898989898989

Map | Get Lat/Long

## Critical Fields

1. Name : This Field is used maintain the location Name.(Ex : Location 1)

## Critical & onetime setup fields

## Non-Critical Fields

1. Country : We can select the country name from the list.(Ex : India)
2. State : We can select the state name from the list .(Ex : Tamil Nadu)
3. City : We can select the city name from the list.(Ex : Coimbatore)
4. Address Fields : Used to maintain the address of the location.
5. Postal Code : Used to give postal number.

## **Zoom condition's**

1. We can zoom and check the transactions by using this partner locations.(Ex :  
Invoice,Subcontract Receipt,..)

## **Validation**

1. Save : Used to save the record.
2. Delete : Used to delete the existing record .

Tab

# Bank Account

KONNECT ANALYTICS

Prasanth P@Konnect Demo.1/Konnect Demo Admin

Feedback | Profile | Preference | Change Role | Log Out

Home (7) | Summary | Employee: 1000003 Name 1 ✕

Employee > Bank Account

Data requested

Bank Accounts

Client: Konnect Demo

Organization: Manufacturing Discrete

Employee Name: Name 1

User/Contact: Name1

Active: ☒

Bank: State Bank\_-1

Account No: 3455 4898 4932 4389

Account Usage: Both

Bank Account Type: Current Account

IFSC Co

Card

Cash

Checking

Current Account

Fixed Deposit Account

OD

Recurring Deposit Account

## Critical Fields

1. Bank : We should select the bank name from the bank master.(Ex : State Bank)

## Critical & onetime setup fields

## Non-Critical Fields

1. User/Contact : We select the user contact name from the contact user tab.(Ex : Name 1 )
2. Account No : Used to maintain the Bank Account Number.
3. Bank Account Type : Used to select the Account type like Card,Cash,Checking,Current Account,Fixed Deposit ,OD,Recurring Deposit Account,Salary Account, Savings.
4. Account Usage : Used to maintain the usage like Direct Debit,Direct Deposit,Both,None.

## **Zoom condition's**

### **Validation**

1. Save : Used To Save the record .
2. Delete : Used to Delete the Existing record .

Tab

# Personal Information

The screenshot shows the 'Personal Information' tab for an employee in the Konnect Analytics system. The form is divided into two main columns. The left column contains fields for Client (Konnect Demo), Employee Name (Name 1), Date of Birth (31/03/1997), Blood Group (A+), Languages Known (Tamil, English), Aadharcard Number (43454777678879768), Driving License, Passport Number, Department (Accounts), Position (Accountant), Employee Source, Payment Type (Bank), and Date of Joining (01/04/2020). The right column contains fields for Organization (Manufacturing Discrete), UAN, Gender (Male), Marital Status (Single), Pancard Number, ESI, PF Number (534488998967), Active checkbox (checked), Contract, Employee Category, Shift, and Date of Relieving (31/12/2030). A dropdown menu for Marital Status is open, showing options: Divorced, Married, Single (highlighted), and Widowed. The top navigation bar includes links for Feedback, Profile, Preference, Change Role, and Log Out. The left sidebar shows Favourites and Recent Items.

## Critical Fields

1. Date of Joining : It is used to maintain the joining date of this particular Employee.

## Critical & onetime setup fields

## Non-Critical Fields

1. Blood Group : Used to mention the Blood Group of the Employee.(Ex : A+,B+,AB+,O-,...)
2. Gender : Used to mention the Gender (Ex : Male,Female,TransGender).
3. Marital Status : Used To mention their marital status(Ex :  
Single,Married,Divorced,Widowed)
4. Department : Used to maintain the Employee working department.(Ex : Accounts, Refer

Department Master)

5. Position : Used to maintain the Employee Position in that particular department (Ex : Accountant, Refer Position Master)
6. Wedding Date : Used To mention their Wedding date (While choosing martial status as Married wedding date popup will appear)
7. Father Name : Used to mention the Fathers's name
8. Mother Name : Used to mention the Mother's Name
9. Spouse Name : Used to mention the Wife or Husband Name.
10. Languages Known : Used to maintain the language known details
11. UAN Number : Used to Maintain the PF UAN Number
12. Aadharcard Number : Used Maintain the Employee Aadharcard Number.
13. PF Number : used to maintain the PF Number
14. ESI : Used to maintain the ESI Number
15. Pancard Number : Used to maintain the Pancard Number to the employee
16. Driving License : Used to maintain the employee driving license number
17. Passport Number : Used to maintain the Passport number
18. Probation Period : This Date field is used to give the probation date
19. Date Of Relieving : Field is used to mention the Relieving Date
20. Date Confirm : Used to maintain the employee confirmation date
21. Complete Plan : Used to maintain the plan completion date.

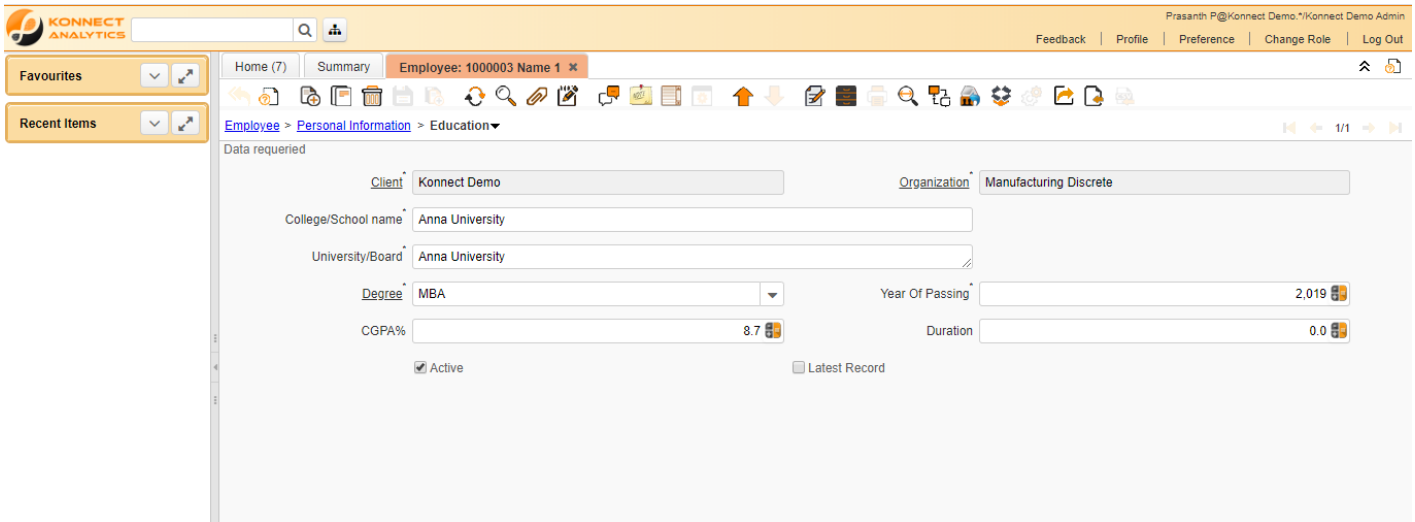
## **Zoom condition's**

## **Validation**

1. Save : used to save the record.
2. Delete : used to delete the records.

Tab

# Education



The screenshot shows the 'Education' form in the Konnect Analytics application. The interface includes a top navigation bar with the Konnect Analytics logo, a search bar, and user information (Prasanth P@Konnect Demo.\*Konnect Demo Admin). Below the navigation bar is a sidebar with 'Favourites' and 'Recent Items' sections. The main content area displays the 'Education' form for 'Employee: 1000003 Name 1'. The form fields are as follows:

Field	Value
Client	Konnect Demo
Organization	Manufacturing Discrete
College/School name	Anna University
University/Board	Anna University
Degree	MBA
Year Of Passing	2,019
CGPA%	8.7
Duration	0.0
Active	<input checked="" type="checkbox"/>
Latest Record	<input type="checkbox"/>

## Critical Fields

1. College/School Name: Used to mention the college name . (Ex : Anna University)
2. University/Board : Used to mention the University name .(Ex : Anna University)
3. Degree : Used to mention the Degree.(Ex : MBA , Refer Degree Master Window)

## Critical & onetime setup fields

## Non-Critical Fields

1. Year Of Passing : Used To mention the passed out year.
2. CGPA % : Used to mention the Percentage.

## Zoom condition's

# Validation

1. Save : Used to save the record
2. Delete : Used to delete the record.



Tab

# Experience

The screenshot shows the 'Experience' tab in the Konnect Analytics system. The form is titled 'Employee: 1000003 Name 1'. It contains the following fields:

- Client:** Konnect Demo
- Organization:** Manufacturing Discrete
- Employer Name:** Info Pvt.Ltd
- Location:** Coimbatore
- Designation:** Accountant
- Gross Salary:** 20,000.0
- Job Description:** (Empty field)
- Reason For Leaving:** Company Location Changed.
- From Date:** 01/02/2019 12:00:00 PM
- To Date:** 01/02/2020 12:00:00 PM
- Active:** ☒
- Latest Record:** ☐

## Critical Fields

1. Employer Name : Used to maintain the previous Employer Name of the Employee.
2. Reason For Leaving : Used To mention the Relieving Reasons.
3. From Date : Employee Joining date in that Company.
4. To Date: Employee Relieving Date from that company.

## Critical & onetime setup fields

## Non-Critical Fields

1. Designation : Used to mention Employee Designation in that previous company.
2. Gross Salary : Used to mention Previous Salary of the Employee.

## Zoom condition's

# Validation

1. Save : Used to save the document
2. Delete : Used to delete the Records.

Tab

# Training

The screenshot shows the 'KONNECT ANALYTICS' web application interface. The top navigation bar includes a search bar, user profile 'Prasanth P@Konnnect Demo', and links for 'Feedback', 'Profile', 'Preference', 'Change Role', and 'Log Out'. The left sidebar contains 'Favourites' and 'Recent Items' sections. The main content area displays the 'Employee: 1000003 Name 1' record, with tabs for 'Home (7)', 'Summary', and 'Training'. The 'Training' tab is active, showing a 'Record saved' message. The form fields include: 'Client' (Konnnect Demo), 'Organization' (Manufacturing Discrete), 'Institution Name' (Techno Institute), 'Description' (empty text area), 'From Date' (01/10/2018), 'To Date' (31/12/2018), and an 'Active' checkbox which is checked.

## Critical Fields

1. Institution Name : We Can fill the Training Institution name.
2. From Date : Training Starting date.
3. To Date : Training End date.

## Critical & onetime setup fields

## Non-Critical Fields

## Zoom condition's

# Validation

# Validation

Validation

# Validations

## **Save :**

Used to save the document.

## **Delete :**

Used to delete the records.

# Video